



Commonwealth of Massachusetts
DEPARTMENT OF HOUSING &
COMMUNITY DEVELOPMENT

Deval L. Patrick, Governor ♦ Timothy P. Murray, Lt. Governor ♦ Tina Brooks, Undersecretary

January 18, 2007

Dear Local Official:

The Department of Housing and Community Development (DHCD) has recently completed the update to the Chapter 40B Subsidized Housing Inventory (SHI). The SHI is used to measure a community's attainment of affordable housing goals for the purposes of M.G.L. Chapter 40B, the Comprehensive Permit Law.

Please find enclosed the SHI for your community, which lists the project name and location, number of units and subsidizing agency for all the qualifying units. Confidentiality restrictions prohibit us from releasing the unit numbers or exact street addresses of any subsidized unit and the location of all DMR and DMH units. The percentage of subsidized housing in a community is calculated by dividing the number of qualifying units (SHI units) in the community by its total number of year-round housing units as enumerated in the 2000 U.S. Census.

The update included reviewing the information submitted in response to the DRAFT 2006 SHI that was mailed to communities on August 17, 2006, adding new eligible units submitted by local communities, updating information on individual projects, removing units with expired use restrictions which have not been extended, and removing units where building permits had not been provided within one year of the comprehensive permit becoming final. The current SHI information is derived from information provided to DHCD by individual communities and is subject to change as new information is obtained and use restrictions expire. Units were not added to the SHI if such units were not eligible for inclusion on the SHI, or where incomplete information or inadequate documentation was provided to establish SHI eligibility.

For more information on the SHI, please visit <http://www.mass.gov/dhcd/ToolKit/shi.htm>. This page includes links to the SHI percentages for all communities across the Commonwealth, an updated Eligibility Summary for SHI units, the Requesting New Units Form and the excel spreadsheet for Housing Rehab Units Only.

Communities may submit the Requesting New Units form with supporting documentation and the Housing Rehab Units Only spreadsheet at any time during the year. Please submit all requests to add new units to the mailing address listed below, Attention: Margaux LeClair. Electronic submissions can be sent to margaux.leclair@state.ma.us. The DHCD will publish updated information for the SHI online on a monthly basis.

We also include several documents that will be useful to local officials. First, the Eligibility Summary provides extensive information about housing that is eligible for inclusion on the SHI. Second, the Priority Development Fund brochure describes a funding program whereby communities can obtain up to \$50,000 in funding for technical assistance and planning that will result in the production of housing. Third is a 'save the date' notice for upcoming public information sessions on DHCD's Analysis of Impediments to Fair Housing Access and Action Steps to Mitigate Them, published in December 2006. The information sessions will provide stakeholders the opportunity to learn about the impediments revealed by our analysis, and our proposals to mitigate them in the future. We invite public comment on our analysis and proposals throughout the end of February 2007, and invite all stakeholders to attend the meetings and public hearings more fully described in the enclosed document.

Sincerely,

Tina Brooks
Undersecretary for Housing

DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT CH40B SUBSIDIZED HOUSING INVENTOI

Acton

DHCD ID #	Project Name	Address	Type	Total SHI Units	Affordability Expires	Built w/ Comp. Permit?	Subsidizing Agency
9	McCarthy Village	Sachem Way	Rental	23	Perp	Yes	DHCD
10	Windsor Green	68 Windsor Ave.	Rental	68	Perp	Yes	DHCD
11	n/a	27 Concord Rd.	Rental	12	Perp	No	DHCD
12	n/a	Scattered Sites	Rental	9	Perp	No	DHCD
13	n/a	scattered sites	Rental	18	Perp	No	DHCD
14	McCarthy Village	Sachem Way	Rental	12	Perp	Yes	DHCD
15	Bellows Farm	Stow St	Ownership	1	Perp	No	DHCD
16	Bellows Farm	Nylander Way	Ownership	1	Perp	No	DHCD
17	Harris Village	Harris Street nr Rt 2A	Ownership	4	Perp	No	DHCD
18	Minuteman Lane	Minuteman Road	Ownership	1	Perp	No	DHCD
19	West Road	West St	Ownership	1	Perp	No	DHCD
20	Bellows Farm	Willow St	Ownership	1	Perp	No	DHCD
21	Bellows Farm	Conant Street	Ownership	1	Perp	No	DHCD
22	Bellows Farm	Central Street	Ownership	1	Perp	No	DHCD

1/16/2007

Acton

This data is derived from information provided to the Department of Housing and Community Development (DHCD) by individual communities and is subject to change as new information is obtained and use restrictions expire.

DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT CH40B SUBSIDIZED HOUSING INVENTO

Acton

DHCD ID #	Project Name	Address	Type	Total SHI Units	Affordability Expires	Built w/ Comp. Permit?	Subsidizing Agency
23	Bellows Farm	Mass Ave	Ownership	1	Perp	No	DHCD
24	Westside Village	Westside Drive	Ownership	4	Perp	Yes	DHCD
25	Crossroads Condominiums	244-248 Main Street	Ownership	3	2101	Yes	FHLBB
3685	Inn at Robbins Brook- Assisted Living	10 Devon Drive	Rental	3	Perp	No	DHCD
4184	DMR Group Homes	Confidential	Rental	18	N/A	No	DMR
7159	Franklin Place	520 Main Street	Ownership	3	perp	Yes	MassHousing
7160	Dunham Lane	Dunham Lane	Ownership	1	perp	No	DHCD
7161	Fort Pond Brook Place	68 River Street (aka 111-113 School St)	Ownership	2	perp	Yes	DHCD
7589	DMH Group Homes	Confidential	Rental	10	N/A	No	DMH
7684	Woodlands at Laurel Hill	551-557 Great Road Rear & 80-82 Nagog Park	Mix	296	perp	YES	MassDevelopment
7930	The Residences at Robbins Brook	Hartland Way and Preston Way	Ownership	0	perp	NO	DHCD
ActonTotals				494	Census 2000 Year Round Housing Unit	Percent Subsidize	7,645 6.46%

1/16/2007

Department of Housing and Community Development (DHCD) Eligibility Summary for the Subsidized Housing Inventory (SHI)

The SHI is used to measure a community's stock of low-or moderate-income housing for the purposes of M.G.L. Chapter 40B, the Comprehensive Permit Law. While housing developed under Chapter 40B is eligible for inclusion on the SHI, many other types of housing also qualify to count toward a community's affordable housing stock. This summary outlines the criteria for eligibility on the SHI, lists eligible subsidizing agencies and programs, and includes important notes for specific types of housing.

Section 1 – General Criteria

A. Project Criteria

A housing development shall be eligible to be included on the SHI if:

1. The housing development has received **final written subsidy approval** by the federal or state government under any eligible program pursuant to 760 CMR 30.00, 31.00 or 45.00 to assist the creation of housing which is affordable to eligible households (see Section 1B, below). A list of SHI Eligible Housing Programs can be found at the end of this document.
2. The affordable housing units are subject to a **long term use restriction** recorded at the registry of deeds or filed with the land court registry district (such as an executed regulatory agreement, affordable housing restriction, deed rider or other legally binding document) that identifies the subsidizing agency, and monitoring agent if applicable, and effectively restricts occupancy of low- and moderate-income housing to eligible households for a specified term of affordability, and which provides for effective administration, monitoring, and enforcement of such restriction including (but not limited to) enforcement and resales, where applicable. Affordable rehabilitated units must be subject to a minimum 15 year use restriction. Newly created affordable units must be subject to a minimum 30 year use restriction.
3. The affordable housing units are subject to an **Affirmative Fair Marketing Plan** approved by the subsidizing agency.

B. Eligible Households – Income and Asset Limitations:

In order for a household to be eligible to rent or purchase a restricted unit the household's income shall not exceed 80% of the area median income, adjusted for household size.

For homeownership programs, the housing program, through its statutory basis, regulations, or guidelines, may establish asset limitations for eligible households. In the absence of such provisions, eligible households shall be subject to the following asset limitations:

- For age-restricted homeownership units, (where at least one household member is 55 or over) household assets shall not exceed \$50,000 in value, provided that the purchaser household may additionally own a dwelling (to be sold) in which the purchaser has no more than \$200,000 in equity. (Note: For New England Fund, Housing Starts, and the Local Initiative Program, this asset limit applies for projects which applied for a determination of project eligibility on or after January 1, 2006. For such projects which applied for a determination of project eligibility prior to that date, then-existing program asset limits apply.) For a detailed description of assets, please refer to the Appendix.
- For non-age restricted homeownership units, household assets shall not exceed \$50,000 in value. For a detailed description of assets, please refer to the Appendix.

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C. Monthly Housing Cost:

Generally, the housing program, through its statutory basis, regulations, or guidelines establishes the maximum monthly housing cost. In the absence of such a provision, monthly housing costs (in the case of rental housing, rent inclusive of utilities, and in the case of homeownership, principal, interest, taxes, insurance, and association fees) shall not exceed 30% of monthly income for a household earning 80% of area median income, adjusted for household size.

Section 2 – Specific Criteria for Inclusion on the SHI

A community may request units be included on the SHI at any time by submitting a "Requesting New Units Form" with supporting documentation. The "Requesting New Units Form" is available at: <http://www.mass.gov/dhcd/Toolkit/RNUF.doc>

A. When Units Count on the SHI

Units shall be eligible to be counted towards the SHI at the earliest of the following:

1. When comprehensive permits become final (when applicable).
Units permitted under a comprehensive permit are eligible to be counted on the SHI when the associated comprehensive permit has become final pursuant to 760 CMR 31.08(4). Comprehensive permits become final **EITHER** on the date that the permit is filed with the town clerk provided that no appeals are filed **OR** on the date when the last appeal is fully resolved. However, if twelve months or more elapses before the corresponding building permits are issued, the units will become ineligible for the inventory until such date that the building permits are issued.
2. When corresponding building permits are issued.
3. When corresponding occupancy permits are issued.
4. When corresponding use restrictions are recorded (if no building permits or occupancy permits are required.)

Units shall no longer be eligible for inclusion on the SHI upon expiration or termination of the use restriction. However, if the affordability has been preserved by the issuance of a tenant protection voucher, by operation of law or other preservation program or mechanism and the appropriate documentation has been submitted to the DHCD, the units may be eligible to remain on the SHI. In addition, Homeownership Opportunity Program (HOP) resale controls are intended to be in effect in perpetuity. If an eligible purchaser cannot be located for a HOP affordable unit and the resale controls lapse in accordance with the program, the unit shall continue to be counted.

For housing units that are subject to a deed rider that survives foreclosure and that is approved by Fannie Mae and DHCD, units shall count on the SHI for the full term of the restriction, even if the unit is occupied by an ineligible household.

B. Qualifying Housing Units on the SHI

Units shall count on the subsidized housing inventory according to the following rules, regardless of the zoning or permitting mechanism utilized:

1. All affordable housing units that meet the criteria outlined in Section 1 shall be eligible for inclusion on the SHI.

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2. In a rental development, if at least 25% of units are to be occupied by eligible households earning 80% or less than the area median income (or alternatively, if at least 20% of units are to be occupied by households earning 50% or less of area median income) and meet all criteria outlined in Section 1, then all of the units in the rental development shall be eligible for inclusion on the SHI. If fewer than the aforementioned percentages of units in the development are so restricted, then only the affordable units are eligible for inclusion on the SHI.

Section 3 - Notes on Specific Programs and Funding Sources

- A. Local Initiative Program Developments** If a development is created pursuant to a local housing initiative, and meets the requirements of 760 CMR 45.00, the community may apply to DHCD for inclusion of units in the SHI. Eligibility for inclusion on the SHI shall be in accordance with Sections 1 and 2. Any accessory apartment which is approved pursuant to a city or town's ordinance or bylaw and which has been approved by DHCD pursuant to LIP shall be eligible for inclusion on the SHI. For more information about LIP, call DHCD's Division of Housing Development at 617.573.1359.
- B. Chapter 40R Developments** If a development is permitted pursuant to MGL Chapter 40R, the housing development shall be eligible for inclusion on the SHI, upon the issuance of building permits in accordance with the criteria outlined in Sections 1 and 2. For more information about Chapter 40R, call the Division of Policy Development at 617.573.1100.
- C. Long-term Subsidized Housing for Individuals Who are Mentally Ill or Mentally Retarded** All group home units in each community as reported annually to the DHCD by the Department of Mental Health (DMH) and the Department of Mental Retardation (DMR) shall be eligible to be included on the SHI. Please note that group home units serving clients of the DMH and DMR are subject to privacy restrictions, but the number of such units in each community which are eligible to be included on the SHI is provided to DHCD by the respective departments annually.
- D. Community Preservation Act** Community housing units are defined and created by a city or town pursuant to MGL Chapter 44B. Community housing units which have obtained Local Initiative Program approval pursuant to 760 CMR 45.00 shall be eligible for inclusion on the subsidized housing inventory.
- E. Urban Center Housing – Tax Increment Financing Units** Urban Center Housing Units, defined in MGL Chapter 40 section 60, shall be eligible for inclusion on the SHI, upon the issuance of building permits in accordance with the criteria outlined in Sections 1 and 2.
Section 8 Tenant Protection Vouchers Housing units that have become market rate as a result of termination of a Section 8 Contract and for which the United States Department of Housing and Urban Development has issued Section 8 tenant protection vouchers to preserve affordability for the existing income eligible tenant may be included on the SHI. DHCD will count such units upon receipt of a written request from the community detailing the number of tenant preservation vouchers in place as reported by the local housing authority. The units will be subject to annual verification. [Note that Section 8 Housing Choice (Mobile) Vouchers are not eligible for inclusion.]
- F. Housing Rehabilitation Units** Housing units that are subject to a lien through a housing rehabilitation program funded through the Community Development Block Grant (CDBG) or HOME program are eligible to be included on the SHI. The party administering the grant locally is responsible for submitting the necessary information and monitoring the status of the liens. Information on individual grant recipients will remain confidential. Requests to add

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these units to the SHI may be submitted electronically by downloading and completing the excel spreadsheet available at: <http://www.mass.gov/dhcd/ToolKit/shi.htm>. Explanatory notes are included in the spreadsheet by holding the cursor over the cells in the header row. Contact information is also included in the header row of the spreadsheet.

Section 4 – Housing Program Eligibility

SHI Eligible Housing Programs

As of January 1, 2007, the following housing programs are considered low or moderate-income housing programs for purposes of G.L. c.40B, §§ 20-30, 760 CMR 30.02(k), 31.04 (1)(a).¹ Please note that subsidizing agencies periodically modify existing programs and create new low- or moderate-income housing programs. If you have any questions relating to whether a low- or moderate-income housing program should be added to or deleted from this list, please contact DHCD.

A. State Programs

Affordable Housing Trust Fund
Chapter 167 (Special Needs Housing)
Chapter 200 (Veterans' Housing)
Chapter 667 (Elderly Low Income Housing)
Chapter 689 (Special Needs Housing)
Chapter 705 (Family Low Income Housing)
DHCD Capital Improvement and Preservation Fund (CIPF)
DHCD Commercial Area Transit Node Housing Program (CATNHP)
DHCD Community Based Housing Program (CBH)
DHCD Community Development Block Grant (CDBG) including:
 Homeowner Rehab, HDSP (some uses), and CDF (some uses)
DHCD Facilities Consolidation Fund (FCF)
DHCD Homeownership Opportunity Program (HOP)²
DHCD Housing Innovations Fund (HIF)
DHCD Housing Stabilization Fund (HSF)
DHCD Local Initiative Program (LIP)
DHCD Mass Rental Voucher Program (MRVP) Project Based Vouchers Only
DHCD Tax Exempt Local Loans to Encourage Rental Housing (TELLER)
DMH Community Based Housing (Group Homes)
DMR Community Based Housing (Group Homes)
MGL Chapter 40R (Smart Growth Zoning Act)
Massachusetts Low Income Housing Tax Credits (LIHTC)
Massachusetts Housing Partnership Fund (MHP) MATCH Program
Massachusetts Housing Partnership Fund (MHP) Permanent Rental Financing Program

¹ This listing does not provide a conclusive indication as to whether any housing development or housing unit is within the statutory definition of low- or moderate-income housing, though this listing is generally accurate as a reference and is used by DHCD in making such determinations. Such determinations are subject to review by the Housing Appeals Committee in the context of formal appeals concerning particular housing proposals. In addition, because of program changes and new programs, this list is updated periodically to insure its accuracy. Please contact the DHCD Director's Office at 617.573.1100 if you are aware of changes that should be reflected on this list.

² Private HOP projects are eligible to count towards the SHI.

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EOT Transit Oriented Development (TOD) Infrastructure & Housing Support Program
MassHousing Chapter 13A Interest Reduction Subsidy Program
MassHousing Chapter 236 Program
MassHousing 80/20
MassHousing Elder Choice
MassHousing Expanding Rental Affordability (ERA)
MassHousing Housing Starts
MassHousing Multi-Family Rental
MassHousing Options for Independence
MassHousing Rental Development Action Loan (RDAL)
MassHousing State Housing Assistance for Rental Production (SHARP)

B. Federal Programs³

FHLBB Affordable Housing Program (AHP)
FHLBB New England Fund (NEF)
Federal Low Income Housing Tax Credit Program (LIHTC)
HUD CDBG (Homeowner Rehabilitation in some cases)
HUD Federal Public Housing
HUD HOME Program (Rental Production, Project-Based Homeownership, Homeowner Rehab)
HUD Section 202 (Supportive Housing for the Elderly)
HUD Section 221(d)(3)
HUD Section 231
HUD Section 236
HUD Section 8 Demo Dispo (administered by MassHousing)
HUD Section 8 Mark-to-Market (administered by MassHousing)
HUD Section 8 Moderate Rehabilitation Program (some units administered through DHCD)
HUD Section 8 Moderate Rehabilitation Single Room Occupancy (SRO) Program
HUD Section 8 New Construction
HUD Section 8 Project Based Assistance
HUD Section 8 Project-Based Rental Certificate Program
HUD Section 8 Substantial Program
HUD Section 811 (Supportive Housing for Persons with Disabilities)
HUD Shelter Plus Care (Project-Based Rental Assistance and SRO-Based Assistance only)
USDA Rural Housing Service (RHS) Rural Rental Housing 515 Program

SHI Ineligible Housing Programs

The following programs, as well as programs not appearing anywhere on this listing are not usually deemed low- or moderate-income housing programs for purposes of G.L. c. 40B§ 20-23, 760 CMR 30.02, 31.04 (1)(a).⁴

DHCD Alternative Housing Voucher Program (AHVP)
DHCD Community Development Action Grant (CDAG)

³ HUD is the U.S. Dept. of Housing and Urban Development; FHLBB is the Federal Home Loan Bank; USDA Rural Housing Service was the Farmers' Home Administration.

⁴ This listing does not attempt to be all-inclusive because of the large number of housing related programs and programs that have a housing component. This list provides examples of programs that are frequently mistaken as an eligible housing program.

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DHCD Massachusetts Rental Voucher Program (formerly Chapter 707 Program)
DHCD Soft Second Loan Program (also administered through MHP)
Hospitals
HUD Shelter Plus Care (Tenant-Based Rental Assistance, Sponsor-Based Rental Assistance)
HUD Emergency Shelter Grants Program
HUD HoDAG (Housing Development Action Grant)
HUD HOME Program (Tenant Based Rental Assistance, Homeownership Purchaser Based)
HUD HOPE (Home Ownership for People Everywhere)
HUD Section 8 Housing Choice Voucher Program (HCVP)
HUD Section 8 Loan Management Set-Aside Program
HUD Section 8 Property Disposition Set-Aside Program
HUD Section 8 Rental Certificate Program
HUD Section 221(d)(2) & 221(d)(4)
HUD Urban Development Action Grant (UDAG)
Military Housing
Prisons
Special Needs Schools
USDA Rural Development Section 502 Program

Correspondence

Requests to add new units and suggested corrections to the SHI may be submitted with supporting documentation, in writing, by the municipality, a developer, or a member of the public to DHCD, Office of Policy Development, 100 Cambridge Street, Suite 300, Boston, MA 02114-2524, Attention: Subsidized Housing Inventory. All submissions will be reviewed and revised SHI percentages will be published online on a monthly basis at: <http://www.mass.gov/dhcd/ToolKit/shi.htm>.

Department of Housing and Community Development (DHCD) Eligibility Summary for the Subsidized Housing Inventory (SHI)

Appendix A: Definition of Assets

The value of necessary items of personal property, such as furniture or automobiles shall be excluded. Determination of assets shall be based upon a full and fair present cash value of the asset at the time of application to the program. If a potential purchaser divests himself or herself of an asset for less than full and fair present cash value of the asset within one year prior to application, the full and fair cash value of the asset at the time of its disposition must be declared and shall be included for purposes of calculating eligibility.

Household Assets include the following:

1. Cash held in savings and checking accounts, safe deposit boxes, homes, etc: For savings accounts, use the current balance. For checking accounts, use the average balance for the last six months. Assets held in foreign countries are considered assets.

2. Revocable trusts: The cash value of any revocable trust available to the applicant.

3. Equity in rental property or other capital investments: The current fair market value less (a) any unpaid balance on any loans secured by the property and (b) reasonable costs that would be incurred in selling the asset (e.g., penalties, broker fees, etc.).

4. Stocks, bonds, Treasury bills, certificates of deposit, mutual funds, and money market accounts: The value of stocks and other assets vary from one day to another and should be determined within a reasonable time in advance of the applicant's submission of an application to participate in the subject housing program.

5. Individual retirement, 401K, and Keogh accounts: When the holder has access to the funds, even though a penalty may be assessed. If the applicant is making occasional withdrawals from the account, determine the amount of the asset by using the average balance for the previous six months. (Do not count withdrawals as income.)

6. Retirement and pension funds.

a) While the person is employed:

- Amounts the applicant can withdraw without retiring or terminating employment. Count the whole amount less any penalties or transaction costs.

b) At retirement, termination of employment, or withdrawal:

- Periodic receipts from pension and retirement funds are counted as income. Lump-sum receipts from pension and retirement funds are counted as assets. Count the amount as an asset or as income, as provided below. If benefits will be received in a lump sum, include the lump-sum receipt in net household assets. If benefits will be received through periodic payments, include the benefits in annual income. Do not count any remaining amounts in the account as an asset.

If the applicant initially receives a lump-sum benefit followed by periodic payments, count the lump-sum benefit as an asset as provided in the example below and treat the periodic payment as income. In subsequent years, count only the periodic payment as income. Do not count the remaining amount as an asset.

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NOTE: This paragraph assumes that the lump-sum receipt is a one-time receipt and that it does not represent delayed periodic payments. However, in situations in which a lump-sum payment does represent delayed periodic payments, then the amount would be considered as income and not an asset.

7. Cash value of life insurance policies available to the applicant before death (e.g., the surrender value of a whole life policy or a universal life policy): It would not include a value for term insurance, which has no cash value to the applicant before death.

8. Personal property held as an investment: Gems, jewelry, coin collections, or antique cars held as an investment. Personal jewelry is NOT considered an asset.

9. Lump-sum receipts or one-time receipts: Inheritances, capital gains, one-time lottery winnings, victim's restitution, settlements on insurance claims (including health and accident insurance, worker's compensation, and personal or property losses), and any other amounts that are not intended as periodic payments.

10. A mortgage or deed of trust held by an applicant: Payments on this type of asset are often received as one combined payment of principal and interest with the interest portion counted as income from the asset. This combined figure needs to be separated into the principal and interest portions of the payment. (This can be done by referring to an amortization schedule that relates to the specific term and interest rate of the mortgage.)

To count the actual income for this asset, use the interest portion due, based on the amortization schedule, for the 12-month period following the certification. To count the imputed income for this asset, determine the asset value at the end of the 12-month period following the certification.

Household Assets DO NOT include the following:

- Personal property (clothing, furniture, cars, wedding ring, other jewelry that is not held as an investment, vehicles specially equipped for persons with disabilities).
- Interests in Indian trust land.
- Term life insurance policies (i.e., where there is no cash value).
- Equity in the cooperative unit in which the applicant lives.
- Assets that are part of an active business: "Business" does NOT include rental of properties that are held as investments unless such properties are the applicant's main occupation.
- Assets that are NOT effectively owned by the applicant: Assets are not effectively owned when they are held in an individual's name, but (a) the assets and any income they earn accrue to the benefit of someone else who is not the applicant, and (b) that other person is responsible for income taxes incurred on income generated by the assets.

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REQUESTING NEW UNITS FORM

Name of Development _____
Address _____
Total Acreage _____

Subsidizing Agency – List All (i.e., MassHousing, DHCD) _____

Subsidy Program – List All (i.e., Housing Starts, NEF, LIP, HOME) _____

	Rental	Ownership
Total Units in Development		
Total Affordable Units		
Restricted at 80% of AMI		
Restricted at 50% of AMI		
Restricted at 30% of AMI		

Date of Building Permit (Provide Copy) _____

For Comprehensive Permit Projects Only (Provide Copy of Permit)

- Date comprehensive permit application was filed with the ZBA: _____
- Date comprehensive permit was filed with the town clerk: _____
- Was an appeal filed? YES or NO If yes, date all appeals were resolved: _____

Documentation* evidencing the following must be submitted with this form:

1. The zoning or permitting mechanism under which the housing development is authorized
2. The units are subsidized by an eligible state or federal program
3. A long term use restriction has been executed limiting occupancy to income eligible households for a specified period of time (at least thirty years or longer for newly created affordable units, and at least fifteen years for rehabilitated units)
4. The units are subject to an Affirmative Fair Marketing Plan

Submit form and documentation to: **DHCD Policy Office**
Attn: Subsidized Housing Inventory
100 Cambridge Street, Suite 300
Boston, MA 02114

Submitted by: Name & Title: _____
Mailing Address: _____
Phone and email: _____

*Please review the Eligibility Summary for more information about the required criteria for inclusion on the Subsidized Housing Inventory.



**PRIORITY DEVELOPMENT FUND
PLANNING ASSISTANCE FOR HOUSING PRODUCTION
ABBREVIATED GUIDELINES**

MassHousing and DHCD announced the availability of \$3 million from the Priority Development Fund (PDF) to encourage community-based planning that will lead directly to housing production. The agencies are eager to allocate this funding as quickly as possible in order to stimulate housing development and launch high quality projects. To-date, over half of these planning funds have been allocated. The remaining funds will be allocated on a first-come, first-served basis. Funds can be utilized to assist communities to adopt smart growth zoning districts under M.G.L. Chapter 40R; predevelopment activities for municipally controlled sites; and assistance for zoning and other types of planning activities that also significantly increase the supply of housing is an eligible use of funds.

The agencies encourage communities to undertake strategies that will result in a significant increase in the production of housing, especially mixed-income rental housing and modestly sized, modestly priced "starter homes". To be considered "production", units must be newly constructed housing units or rehabilitated units that have been vacant for two or more years, condemned, or made uninhabitable through fire damage; or, the adaptive reuse of non-residential structures.

PDF supports housing proximate to existing infrastructure, community services and public transportation, as well as projects containing ancillary commercial facilities that are secondary to the residential use of the property. All applications must be consistent with the Commonwealth's principles of sustainable development. (www.mass.gov/ocd/smartgrowth.html)

Priority is given to applications that address or encourage new housing production within city or town centers, on brownfields or underutilized commercial or institutional land, or as part of a transit-oriented development opportunity. Priority is also given to the adaptive re-use of existing structures not currently used for housing purposes.

PDF planning assistance will support the following activities:

A. Smart Growth Zoning Overlay District under M.G.L. Chapter 40R. -\$1,000,000 of the PDF has been reserved to assist municipalities in the adoption of smart growth zoning overlay districts pursuant to M.G.L. C.40R. Municipalities interested in applying for PDF assistance to develop new smart growth zoning overlay districts must meet with DHCD staff to ensure the location appears eligible under the criteria set forth in the 760 CMR 59.00. Municipalities with eligible locations can apply for assistance in each of the phases of the zoning process. Over \$250,000 of these funds have been allocated.

(over)

B. Community Initiated Activities such as education and outreach efforts that support the program objectives, including:

- Development of effective mechanisms to deploy local housing trust funds;
- Development of effective strategies to deploy CPA funds and other municipal funds for housing;
- Efforts to build local support to achieve consensus or approval on housing issues.

C. Activities associated with the production of housing in municipally owned/controlled sites including:

- Gaining site control, site analysis, financial feasibility analysis, preliminary architectural and engineering studies, and legal review.
- Development of a Request for Proposal (RFP) for disposition of land.

In addition to mechanisms achievable under M.G.L. Chapter 40R, communities interested in undertaking bold, high impact up-zoning incentives that encourage communities to increase unit-per-acre zoning regulations within their town centers, near transit, near employment, retail and services, and other appropriate areas to facilitate more compact, vital development areas should discuss their need for PDF assistance with DHCD.

Note: The PDF assistance is not available to serve as a substitute for pre-development assessment of alternative development scenarios for parcels already controlled by an identified private developer, or to supplant municipal funds to pay staff salaries.

Eligible applicants consist of cities and towns within the Commonwealth. Municipalities may enter into third party agreements with consultants approved by DHCD, however only a municipality will be allowed to enter into a contract with MassHousing regarding the distribution of funds. Municipalities will be responsible for attesting that all funds have been expended for their intended purposes. Joint applications involving two or more communities within a region or with similar housing challenges are strongly encouraged as a way to leverage limited resources however; one municipality will be required to serve as the lead.

In exchange for the assistance, municipalities must agree to share the end product of the funded activities with DHCD and MassHousing and with other communities in the Commonwealth through reports, meetings, workshops, and to highlight these activities in print, on the web or other media outlets.

Communities may apply to DHCD for assistance of up to \$50,000. The amount of funds awarded will be commensurate with the anticipated impact on housing production. DHCD and MassHousing reserve the right to designate proposals as "Initiatives of Exceptional Merit," and increase the amount of assistance and scope of services for certain projects that have a significant impact on the production of sustainable housing.

Electronic applications are available at <http://www.mass.gov/dhcd> (click on link to "grants/guides/plans" on upper right) and must be submitted to: Miryam.Bobadilla@state.ma.us. Applicants are encouraged to meet with DHCD staff to discuss their projects prior to submission of application.

Save the Dates!!!

DHCD will hold five public meetings to discuss the findings and recommendations in our recently published Analysis of Impediments to Fair Housing Access (AI), including a PowerPoint presentation, and invite public comment on the AI. In addition, we will hold 2 public hearings on the AI. Dates and locations are below. The Public Comment Period is extended through February 28, 2007.

Public Presentation and Comment Exchange on the Analysis of Impediments to Fair Housing Access

Worcester

Friday, February 16, 2007 at 2 p.m.
Quinsigamond Community College : Harrington Learning Center : Room 109B
670 West Boylston Street : Worcester, MA 01606-2092

Andover

Tuesday, February 20, 2007 at 11 a.m.
Memorial Hall Library
Elm Square : 2 North Main Street : Andover, MA 01810

Barnstable

Wednesday, February 21, 2007 at 1 p.m.
Barnstable "New" Town Hall
367 Main Street (entrance on South Street) : Hyannis, MA 02601

Northampton

Thursday, February 22, 2007 at 11 a.m.
City Council Chambers : City Hall
210 Main Street : Northampton, MA 01060

Boston

Friday, February 23, 2007 at 10 a.m.
100 Cambridge Street, 2nd Floor : Boston, MA 02114

Public Hearings on the Analysis of Impediments to Fair Housing Access

Northampton

Thursday, February 22, 2007 at 1 p.m.
City Council Chambers : City Hall
210 Main Street : Northampton, MA 01060

Boston

Friday, February 23, 2007 at 12 p.m.
100 Cambridge Street, 2nd Floor
Boston, MA 02114

Kindly respond to let us know which session you will attend: margaux.leclair@ocd.state.ma.us
Please call 617.573.1108 to learn if a meeting is cancelled due to inclement weather.